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Approval

Approving a Travel Request

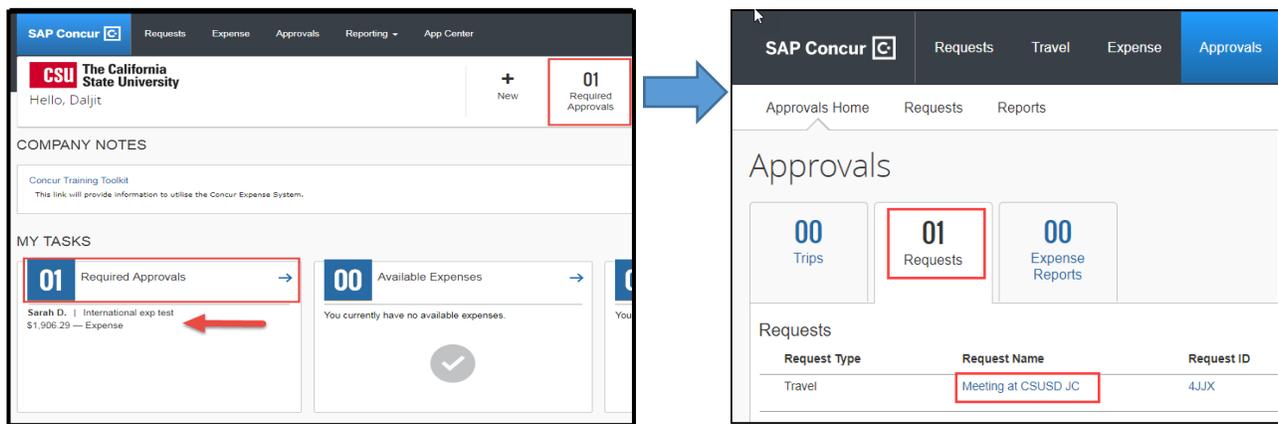
The approver will see requests awaiting approval under Required Approvals on the Concur home page.

On the home page, in the **Required Approvals** section of **My Tasks**, click on **Required Approvals** title of the **blue arrow** to the right.

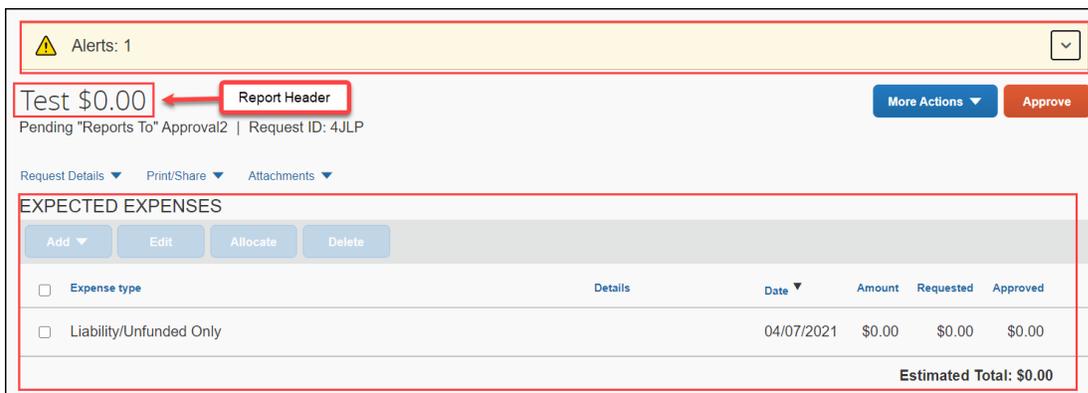
OR

On the home page, in the Quick Task Bar, click the **Required Approvals** tile.

The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.



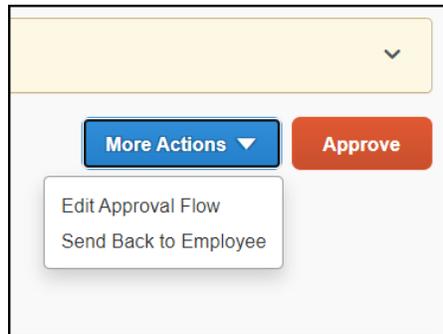
1. Select the Request you wish to approve by clicking the **Request Name**.
2. Review the **Request Header**, **Expected Expenses**, and any **Alerts**. Things to consider:
 - a. Review destination and see if banned state or alerts for high hazard destinations are noted.
 - b. Take note of any personal days and consider that estimated costs are prorated accordingly (i.e. daily meal allowances, incidentals, etc.).
 - c. Review attachments to obtain further information about purpose of trip.
 - d. Review all expenses for reasonableness and completeness.



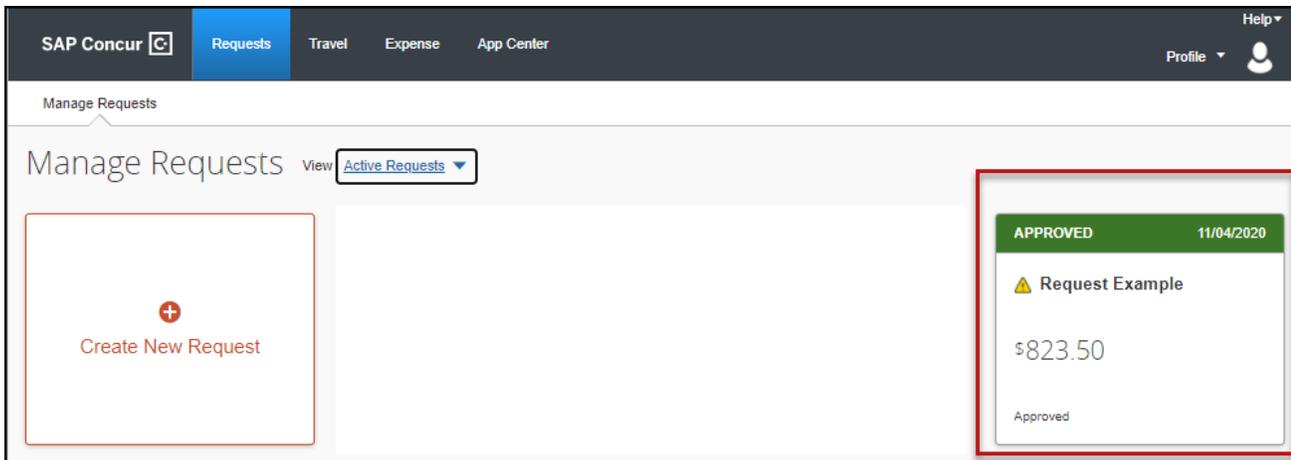
- 3. There are three approval options.
 - a. **Approve** – approve the Request.

Under More Actions:

- b. **Edit Approval Flow** – Allow you to add additional approvals into the workflow. Click **+ Add Step** to enter a **User-Added Approver** box, type in the last name of the approver and select from the dropdown box. You can only select users who are already designated as approvers in the system.
- c. **Send Back to Employee** – Return the Request to the traveler. Use the Comment field in the Send Back Report window to explain the reason the report is being returned, then click OK.



Once Travel Requests have been acted on by the approver, notification regarding the status will be sent to the traveler (and delegate if opted into notifications) and the status will be noted on the traveler’s **Manage Requests** page.



Sending Back a Request

During your review, you may choose to return the request to the employee for correction.

To return a report:

1. Click **More Actions**. Then click **Send Back to Employee**.
2. Enter a **Comment** for the employee explaining why you are returning the request
3. Click **OK**.

CA-PBIS Coalition Conf. F'21 \$350.00
Pending Admin Approval | Request ID: 3U6Q

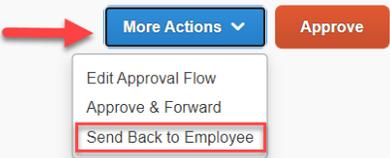
Request Details ▾ Print/Share ▾ Attachments ▾

EXPECTED EXPENSES

▾

<input type="checkbox"/> Expense type	Details	Date	Amount	Requested	Approved
<input type="checkbox"/> Registration/Fees		09/14/2021	\$350.00	\$350.00	\$350.00

Estimated Total: \$350.00



A red arrow points to the 'More Actions' button. The dropdown menu is open, showing three options: 'Edit Approval Flow', 'Approve & Forward', and 'Send Back to Employee'. The 'Send Back to Employee' option is highlighted with a red border.

Send Back to Employee

Comment History

No comments.

Add Comment

Reason for Sending Back the Request*

Adding an Additional Reviewer/Approver Step for a Request

You will have the ability to send the report to another approver. To approve and forward a report:

1. At the top right of the screen, click **More Actions**, then click **Approve & Forward**.
2. Enter the **User-Added Approver**.
3. To add more than one approver, click **Add Step** this will add another User-Added Approver to the workflow.
4. Click **Save**.
5. Click **Approve** to approve the Request and send to the next approver.

The screenshot shows the 'Edit Approval Flow' dialog box. It contains several sections: 'Budget Approval' with two entries, 'Reports To' Approval2, 'User-Added Approver' with a search field and a '+ Add Step' button, and 'Approval for Processing' with a '+ Add Step' button. A red box highlights the '+ Add Step' button under the 'User-Added Approver' section. A red callout bubble points to this button with the text 'Click Add Step to add additional approvers'. At the bottom right, there are 'Cancel' and 'Save' buttons.

6. For Budget Approvers- Click **More Actions** and select **Edit Approval Flow** before approving. You will have the ability to add an additional approver to the workflow. See screenshots below.

- If you want to add an additional Approver after the Budget Approval, you can do so by clicking on the **+Add Step** under the "Budget Approver" line. The **+Add Step** under "Reports to Approval2 will enter an additional approver after the "Report To" Approver.

The screenshot shows the 'Edit Approval Flow' dialog box with a more detailed workflow. It includes 'Budget Approval' with two entries, 'User-Added Approver' with a search field and a '+ Add Step' button, and 'Approval for Processing' with a '+ Add Step' button. Red arrows point to the '+ Add Step' buttons under the 'Budget Approver' and 'User-Added Approver' sections. At the bottom right, there are 'Cancel' and 'Save' buttons.

Reviewing and Approving an Expense Report

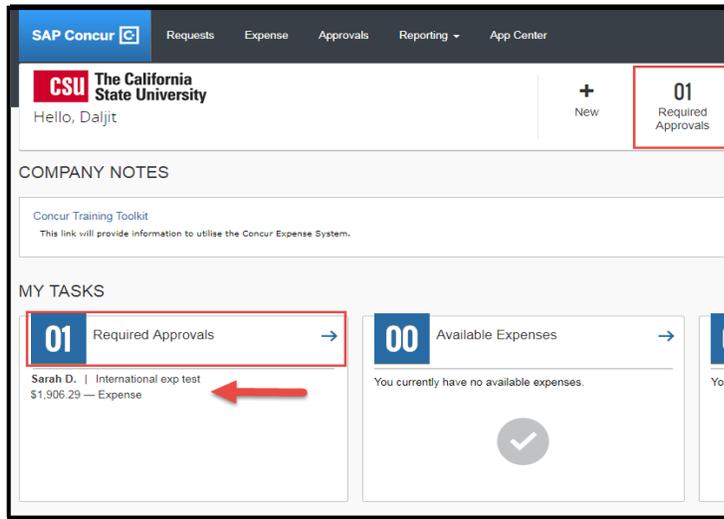
Reviewing an Expense Report

On the home page, in the **Required Approvals** section of **My Tasks**, click on **Required Approvals** title of the **blue arrow** to the right.

OR

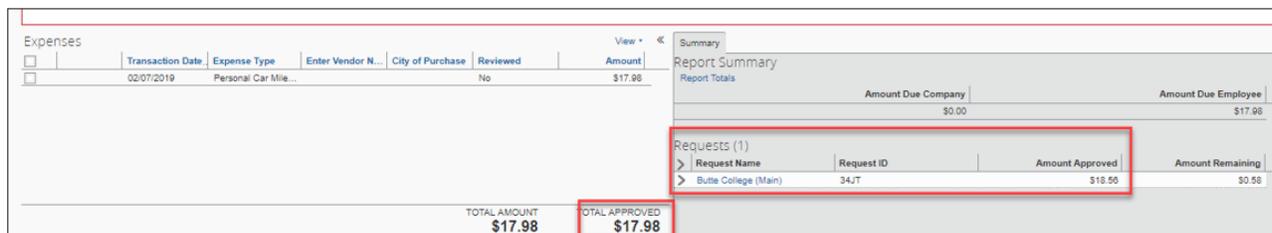
On the home page, in the Quick Task Bar, click the **Required Approvals** tile.

The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.



1. Review the report details. Things to consider:

- Review dates and locations of expenses compared to the original request.
- Take note of any personal days on the request and whether expenses were claimed on those dates.
- Look at any Exceptions.
- Compare the total amount being claimed for reimbursement with what was requested.



Expenses							View	
	Transaction Date	Expense Type	Enter Vendor N...	City of Purchase	Reviewed	Amount		
<input type="checkbox"/>	02/07/2019	Personal Car Mile...			No	\$17.98		
						TOTAL AMOUNT	\$17.98	TOTAL APPROVED
							\$17.98	

Summary			
Report Summary			
Report Totals			
Amount Due Company		Amount Due Employee	
\$0.00		\$17.98	

Requests (1)			
> Request Name	Request ID	Amount Approved	Amount Remaining
> Butte College (Main)	34JT	\$18.50	\$0.58

- Review all expenses for reasonableness and completeness.

Approving an Expense Report

If you are satisfied with the Expense Report, click **Approve** in the top right corner of the screen.

Sending Back an Expense Report

During your review, you may choose to return the entire expense report to the employee for correction.

To return a report:

1. Click **Send Back to User**. The **Send Back Report** window appears.
2. Enter a **Comment** for the employee explaining why you are returning the report.
3. Click **OK**.

International exp test [David, Sarah]

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

Expense Type	Date	Amount	Exception
N/A			No approvers were found for cost object 47800 - Accounting Services (SA-SACST-MDS01-47800).
Hospitality	06/30/2018	GDP 100.00	Please make sure you have the necessary documentation attached with your hospitality expense receipt. Refer to the Hospitality guidelines for more information.

Expenses

Transaction Date	Expense Type	Enter Vendor N...	Additional Info...	City of Purchase	Payment Type	Amount	Adjusted Claim...
07/01/2013	Hotel	Amsterdam Ho...		London, UNITE...	Out of Pocket	\$300.00	
09/30/2013	Laundry				Out of Pocket	\$10.00	\$10.00
09/30/2013	Other Accommodation				Out of Pocket	\$76.00	\$76.00
09/30/2013	Team/Group Travel				Out of Pocket	\$10.00	\$10.00
09/30/2013	Personal Car Mileage				Out of Pocket	\$27.25	\$27.25
09/30/2013	Airfare	British Airways		London, UNITE...	Out of Pocket	\$500.01	\$500.01
09/30/2013	Airline Fees	gg		Sacramento, Ca...	Out of Pocket	\$20.00	\$20.00
09/30/2013	Car Rental	Enterprise		Sacramento, Ca	Out of Pocket	\$74.00	\$74.00

Summary

Report Summary

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$1,908.29

Requests (1)

Request...	Request ID	Amount...	Amount...
internatic...	344R	\$2,530.00	\$2,464.69

Send Back Report

Comment History

Date	Entered By	Comment Text
------	------------	--------------

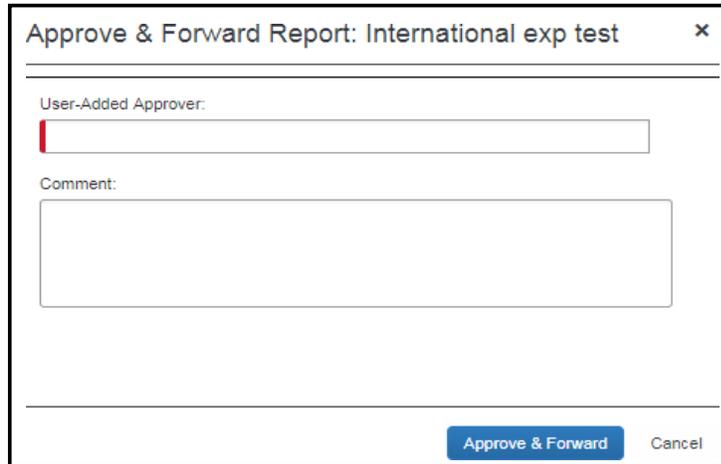
Add a comment to explain why you are returning the report. Then click OK to return the report to the employee.

Comment

Adding an Additional Reviewer/Approver Step for an Expense Report

You will have the ability to send the report to another approver. To approve and forward a report:

1. Click the **Approve & Forward** button in the top right of the screen.
2. Enter the **User-Added Approver**, and add a comment, as needed.
3. Click **Approve & Forward** to approve the Expense Report and send to the next approver.



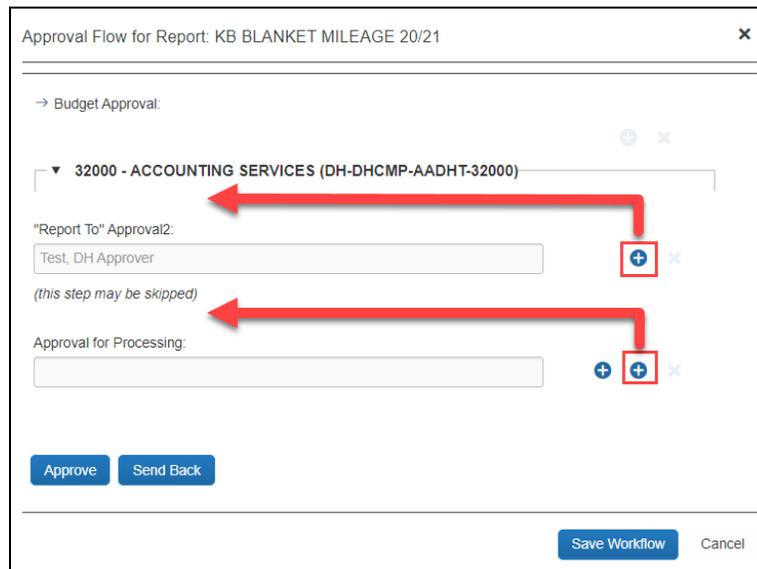
Approve & Forward Report: International exp test

User-Added Approver:

Comment:

Approve & Forward Cancel

4. For Budget Approvers- Click Details and select Approval Flow before approving. You will have the ability to add an additional approver to the workflow. See screenshots below.
 - If you want to add an additional User-Added Approver after the Budget Approval, you can do so by clicking on the addition sign next to the "Report To" Approver2 line. The right addition sign next to the Approval for Processing line will enter an additional approver after the "Report To" Approver.



Approval Flow for Report: KB BLANKET MILEAGE 20/21

→ Budget Approval:

32000 - ACCOUNTING SERVICES (DH-DHCMP-AADHT-32000)

"Report To" Approval2:
Test, DH Approver

(this step may be skipped)

Approval for Processing:

Approve Send Back

Save Workflow Cancel

Delegating Approver Duties

In the case of an absence an approver can delegate the approval step to another person for a temporary window of time.

To add a delegate:

1. Click **Profile > Profile Settings**, on the left-hand side of the page under the Request Settings header click **Request Delegates** or under Profile Options select **Expense Delegates**. Either area will auto update the other.

The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', 'Approvals', and 'Reporting'. Below this is a sub-navigation bar with 'Profile', 'Personal Information', 'System Settings', 'Concur Mobile Registration', and 'Travel Vacation Reassignment'. The main content area is titled 'Profile Options' and contains several sections: 'Your Information', 'Travel Settings', 'Request Settings', 'Expense Settings', and 'Other Settings'. Under 'Request Settings', 'Request Delegates' is circled in red. Under 'Expense Settings', 'Expense Delegates' is circled in red. The 'Expense Delegates' section includes a description: 'Delegates are employees who are allowed to perform work on behalf of other employees.'

2. On the **Delegates** page, click **Add**. The search area appears.
3. Type at least the first three letters of the employee's last name to search for the person you wish to add as a Delegate and click **Add**. You may also search by first name or email address.
4. Check the boxes that correspond with the permissions you are granting to the delegate. In the example below, if you wanted to delegate the approval function only you would check "can approve temporary" add the dates of temporary approval authority and check the "receives approval emails" so that they are also notified as submissions occur. **Note: Make sure "receive approval emails" is checked or delegate will not receive notification of pending approvals.**

Option	Description
*Can Prepare	If selected, the delegate can create expense reports and requests on your behalf.
*Can View Receipts	If selected, the delegate can view receipt images on your behalf.
*Receives Emails	If selected, the delegate receives a copy of each Expense related email that you receive, except for approval emails.
(*) Can Approve	If selected, the delegate can approve expense reports, and requests on your behalf, without date constraints.
(*) Can Approve Temporary	If selected, the delegate can approve expense reports and requests on your behalf but only for the specified period. If you select this option, you must also select beginning and ending date.
Can Preview for Approver	If selected, the delegate can preview requests and expense reports on behalf of another employee. This delegate cannot approve the request/expense report. <i>Note: Allows delegate to review request/reports prior to you approving.</i>
Receives Approval Emails	If selected, the delegate receives a copy of each Expense approval-related email that you receive.

* These options are regarding your own travel requests and expense reports. These are not used for delegate approval options.

(*) The option to delegate approver rights will only be available for Approvers in the system. The approver's rights can only be delegated to another user who also has approval rights in the system. This function can be used for times when an approver is unavailable and approval tasks will be covered by another person in their absence (i.e. Dean unavailable and approvals would be routed to Provost).

5. Click **Save**.

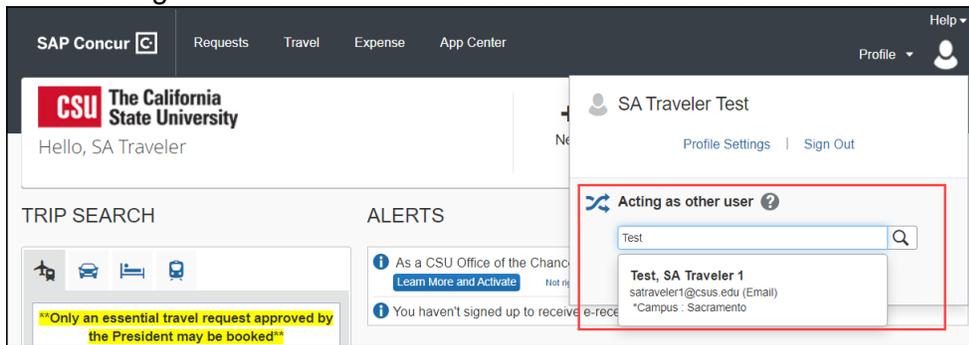
6. To **delete a delegate**, click the checkbox to select the person, click **Delete**, and confirm deletion.

Acting as a Delegate Approver

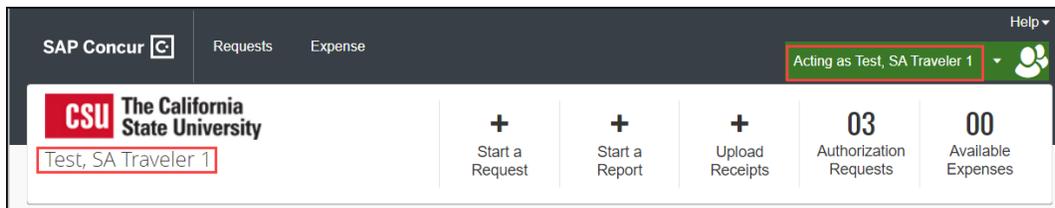
If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as previewer, temporary approver, or always approver roles.

To work as a delegate:

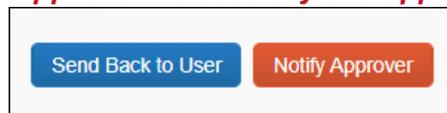
1. Click **Profile**.
2. Under **Acting as other user**, enter the delegator's name or select the appropriate from the drop down. Note: If you are unable to pull up the name, then you are not setup to delegate for the delegator. You will need to reach out to the individual to have them set you up.



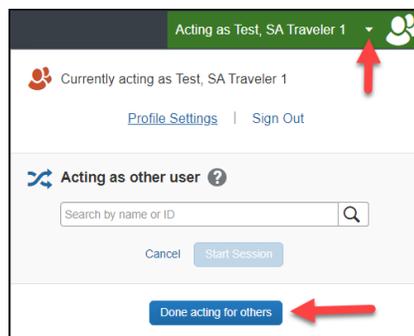
3. Click **Start Session**.



4. Notice the **Profile** menu now displays **Acting as** and shows the name of the employee you are acting on behalf.
5. You are now officially working on behalf of that person. Complete the normal processes for approving as shown above.
6. **For Previewers-** Once the Request or Expense report is reviewed, the Delegate can use the "**Notify Approver**" button to let the approve know the Request or Expense report is ready to Approve. **The Approver must certify and approve themselves.**



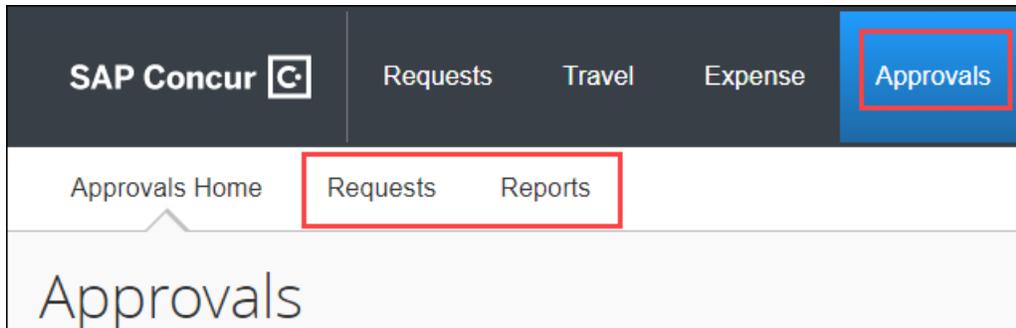
7. To return to your own tasks, click the down arrow next to **Acting as** and then click **Done acting for others**.



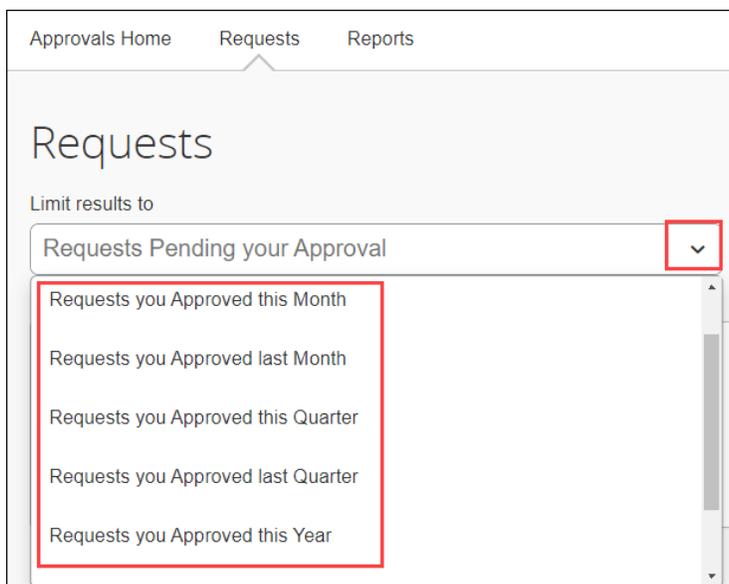
Reviewing Past Approvals- Request & Expense

The Approval tab is the library of all items you have approved within the past 5 years. To view past approved Requests or Expense reports use the following steps:

1. Click **Approvals**. Then click on **Request** or **Reports**.



2. Click on the down arrow to pull up the drop-down list. Select the time frame you would like to view.



3. Click on the **Name** of the request or report you would like to view. Columns can be sorted by clicking on the column name.

Requests you Approved last Month				
Name ↑↓	ID ↑↓	Employee ↑↓	Status ↑↓	Total ↑↓
Korea July 2023	ID: C6W9	Lim, Brian	Approved	\$2,998.67
NACE 2023	ID: 9Y7W	Sa, Voun	Approved	\$0.00
Evora, Portugal-Experi Intl Conf	ID: C3FF	Cyrenne, De-Laine	Approved	\$0.00
Evora, Portugal-Experi	ID: C49R	Tashiro, Lynn	Approved	\$0.00